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SUPERMARKET BUSINESS

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PART ONE
OF TWO PARTS

VOLUME 43/NUMBER 5
MAY 1988

Simplifying Supermarket Communications

New Electronics For You & The Shopper

This man & his machine plan to make your big, new super store obsolete.
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Will electronic shelf labels usher in a new merchandising era?
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Sore wrists in checkers are no small matter. But help is on the way, some POS suppliers say.
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How many hours do you waste at front end? Users of computerized labor scheduling say you wouldn't believe it.
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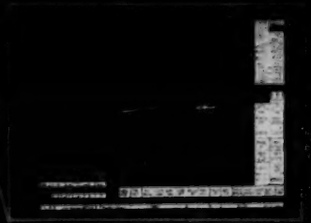

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TRADESCAN

ORANGE STORE WINS PRIZE BY SHOWING ITS TRUE COLORS

It could only happen in a place called Orange, Conn.

First National Supermarkets set up what it claimed was the world's largest Dole orange display in its Edwards Food Warehouse in Orange. In so doing, the chain walked off with Dole's first America Orange Cup prize.

First National had created a record-setting display of 85,000 oranges in February in its Latham, N.Y., Edwards, only to be squeezed out of first place by Pick 'n Pay Hypermarket in Brisbane, Australia soon after. The Aussies set up a display of 120,000 oranges.

Never one to turn down a juicy challenge, Edwards created the monolithic display in its Orange store.

At last report, the display was being gradually dismantled by shoppers.

OPPORTUNITIES GROW FOR GENERIC AND PRIVATE-LABEL PHARMACEUTICALS

Several factors will soon create growth opportunities for private label and generic pharmaceuticals.

One is the coincidental expiration of patents on some 100 prescription medicines over the next few years. Another is possible legislation encouraging the use of generic pharmaceuticals for Medicare recipients.

A third is consumers' growing acceptance of generic and private-label pharmaceuticals, especially in the analgesic and cough and cold remedy categories. Over the last eight years, private-label and generic HBA products' share of market in supermarkets has risen some 30 percent, according to statistics supplied by SAMI/BURKE.

In cough remedies, the most dramatic example, private-label products' share of market has risen from 0.7 percent in 1980 to 2.6 percent in 1987 (between 1986 and 1987 that share doubled). Generic cough remedies' share of market has risen more modestly, but it has grown nevertheless.

The growth in private-label internal analgesics has also been significant. From 1980 to 1987, total private-label share of market rose from 2.8 percent to 4.6 percent.

Judging by recent history, the expiration of so many patents on prescription drugs could signify a surge in the number of products available for private-label and generic packaging. "Often when you have something suddenly approved for over-the-counter, you have a rash of products that all start at the same time," says Alan Miller of SAMI/BURKE. "They wait for the gong to sound, and jump in."

A wave of new proprietary pharmaceuticals could be mind-boggling, but it could also provide opportunities for those retailers able to sort it out and communicate to the price-conscious consumer. "The consumer is becoming more aware of the fact that there are tremendous economies in high-priced prescription drugs that can be bought on a generic basis," says Miller.

KROGER TEAMS WITH PEPSI FOR MARCH OF DIMES FUNDRAISER

Throughout the month of April, when shoppers bought Pepsi products in north Texas Kroger stores, they helped support the local March of Dimes chapter.

For every product purchased at participating stores, Pepsi made a cash donation to the March of Dimes Birth Defects Foundation for continued research, education and medical programs for the prevention of birth defects.

Rolando Blackman, a member of the Dallas Mavericks basketball team, was a celebrity spokesman for the program.

NGA CITES NINE FOR INDUSTRY SUPPORT

The National Grocers Association (NGA) honored nine members of Congress with "Spirit of America" awards for their support of the industry's independent sector.

At a special "Spirit of America" dinner during their 13th annual Public Affairs Conference, NGA presented awards to Senators David Boren (D-Okla.), Robert Kasten (R-Wisc.), Mitch McConnel (R-Ky.) and Dan Quayle (R-Ind.), as well as House members, Steve Barlett (D-Tex.), Delbert Latta (R-Ohio), Tom Luken (D-Ohio), Timothy Penny (D-Minn.) and Peter Rodino (D-N.J.).

"The 'Spirit of America' award reflects our recognition and appreciation of individuals in and outside the industry who have provided exemplary service on behalf of small business and the food distribution industry," said NGA President Thomas K. Zaucha.

During their Washington conference, NGA members also involved more than 300 members of Congress in the group's private sector initiatives program, "Holiday Giving is a Year Round Need." The association donated groceries to a designated food bank or charity on behalf of each member of the House and Senate who attended this year's Private Sector Initiatives reception on Capitol Hill.

TRADESCAN

JAPANESE WHOLESALER JOINS IGA

The Independent Grocers Alliance (IGA) and C. Itoh Food Systems Ltd. of Tokyo, (CFS) have announced an agreement to establish a food distribution system for independent grocers in Japan. As a result, CFS has become the 20th wholesale food company of IGA and the first outside of North America. CFS is a division of C. Itoh & Co. Ltd. of Tokyo, a leading Japanese trading company and was established in 1984 to strengthen the operation of three Japanese wholesalers serving four of Japan's major metropolitan areas.

Under the agreement, which was announced at the 1988 IGA Executive's Conference in February, IGA headquarters in Chicago will help CFS develop a model retail store program for Japanese independent grocers. Makoto Nitadori, senior managing director and c.e.o. of CFS commended IGA for the services it has provided to independent retailers over its 60-year history and stated, "Our Japanese colleagues have confidence in those achievements and will learn from the rich history of IGA's past, as well as its current programs and services."

It has not been decided whether the model program will utilize an existing store serviced by CFS's member wholesalers, or whether a new store will be built.

WHICH COUPONS GET THE BEST RESPONSE? IT DEPENDS ON WHOM YOU ASK

Almost 210 billion coupons were distributed in 1986. Only about 7.5 billion were redeemed. Retailers and manufacturers seeking to determine which coupons are most likely to be cashed in may find conflicting opinions among recent coupon studies.

A study of 1,000 households, conducted by UMS Research Group, found that coupons for motor oil had the most influence on purchase decisions—about 50 percent. In other words, the shoppers surveyed would not have purchased motor oil from the supermarket without a coupon. The same study found that coupons for liquor and health and beauty aids achieved about 40 percent participation, and grocery and pet food items about 35 percent.

A similar study conducted by the Point of Purchase Advertising Institute (POPAI) found the heaviest coupon redemption for hand and bath soap (26 percent) and the lightest redemption for alcoholic beverages (one percent). Detergents, oral hygiene products, cereal and coffee were among the categories with the strongest coupon redemption response in the POPAI study. Salt and spices, fresh meat, packaged baked goods and candy/gum were among the lightest.

A consumer's age, income level and ethnic group all help determine which coupons she will redeem. The UMS study found that blacks and hispanics are highly brand loyal and are therefore less likely to redeem coupons. Coupons, according to the study, are most popular among white households, aged 35 to 44, with over $60,000 annual income.

KINGS MAKES BEEFED-UP DONATION

Kings Super Markets donated a Certified Angus Beef steer to the Community Food Bank of New Jersey for use in its soup kitchens. The steer was a gift from the American Angus Association.

Pictured above are Tom DeMott, meat sales manager for Kings; Kathleen DiChiara, executive director of the Community Food Bank of New Jersey; and Kirk McKean for Certified Angus Beef.

IGA PUTS ITS SUPPORT BEHIND SPECIAL OLYMPICS

IGA, Inc., Chicago, helped make sure that participants in the International Winter Special Olympics Games were well-fed.

As principal sponsors of the Special Olympics winter games, the Chicago IGAs raised $250,000 toward the cost of feeding approximately 1,400 athletes and coaches during the eight-day event. Support came from cash contributions, private-label promotions and food donations.

Meanwhile, in Rhode Island, IGA grocers "staged" their own fund raiser for that state's Special Olympics program.

Along with Roger Williams Foods, a Rhode Island wholesaler, IGA retailers sponsored a production of *That Championship Season*—its second "Evening of Theater" fundraiser.

The show raised more than $2,000 to benefit Rhode Island Special Olympics.

TWO STAND THE TEST OF TIME IN SUPERMARKET BUSINESS CONTEST

While it is not uncommon for SB contest winners to hit the jackpot their very first try, very seldom are they newcomers to the magazine itself. The March winners are no exception.

Paul Depp, who won a gentlemen's watch in the March contest, has been with Olean Wholesale Grocery Co-op for 15 years and is currently a buyer of canned goods for the company. He says he has been reading SUPERMARKET BUSINESS, "Ever since I can remember. I enjoy reading the magazine page by page." He notes that that is a good way to keep up with the competition, as well as find the answers to the contest.

The winner of the ladies' watch, Shirley Carlson, has worked in Direct Delivery for Farmer Jack Supermarkets in Salt Lake City during the past year, after having been with Safeway for 11 years. A reader of the magazine for the past five years she says, "I've never won anything before in my life. This really made my day."

May's prizes will make the day of two winners, who will receive either a multi-purpose alarm or an automatic moisturizer and skin massager. May's contest can be found on page 165, following the list of March's correct entries beginning on page 161.

KROGER LEADS SUPERS IN INCREASED TV AD SPENDING

Supermarkets and convenience stores spent more than $352 million on television advertising in 1987—an increase of 13 percent over 1986. Kroger topped the list with $38.9 million spent on network and spot television (see chart).

Albertson's showed the largest percentage television ad spending increase (52 percent), with Publix (39 percent) and Cub (34 percent) also showing healthy increases.

Only three of the top 15 supermarket advertisers in Broadcast Advertisers Reports—Safeway, Lucky and Ralph's— reduced their television ad spending in 1987. ■

	1986			1987			
CATEGORY TOTAL	Network TV $8,932,400	Spot TV* $302,933,400	Total TV $311,865,800	Network TV $5,836,200	Spot TV* $346,309,500	Total TV $352,145,700	% Change + 13
Kroger	1,846,100	35,614,100	37,460,200	98,300	38,792,000	38,890,300	+ 4
7-Eleven	866,300	8,526,000	9,392,300	67,600	26,605,700	26,673,300	+ 184
Winn-Dixie	5,097,900	16,874,300	21,972,200	5,222,700	17,954,500	23,177,200	+ 5
Safeway	—	20,146,100	20,146,100	—	17,505,000	17,505,000	– 13
Lucky Stores	—	13,176,000	13,176,000	—	12,380,100	12,380,100	– 6
Vons	—	8,080,800	8,080,800	—	9,684,700	9,684,700	+ 20
Publix	—	6,792,600	6,792,600	—	9,461,800	9,461,800	+ 39
Alpha Beta	—	7,043,800	7,043,800	—	8,662,200	8,662,200	+ 23
Albertson's	—	5,343,300	5,343,300	—	8,107,000	8,107,000	+ 52
Food Lion	—	6,677,700	6,677,700	—	7,873,600	7,873,600	+ 18
A&P	—	6,827,900	6,827,900	—	7,589,100	7,589,100	+ 11
Jewel	—	6,127,000	6,127,000	—	7,314,700	7,314,700	+ 19
Dominick's	—	6,627,400	6,627,400	—	6,951,300	6,951,300	+ 5
Cub	—	4,214,500	4,214,500	—	5,637,500	5,637,500	+ 34
Ralph's	—	5,800,200	5,800,200	—	5,333,600	5,333,600	– 8

SOURCE: Television Bureau of Advertising from Broadcast Advertisers Report data
*Includes national syndication

SAMI UPDATE

HBA Sales Accelerate in February

Proprietary remedies benefit from cold and flu outbreaks; new attention given to aspirin

BY ALAN B. MILLER, JR.

During the four weeks ending Feb. 26, 1988, dollar sales in the 52 health and beauty aids (HBA) categories tracked by SAMI/Burke rose more than $54 million (8.7 percent). That performance was matched only by frozen foods—whose 8.7 percent dollar increase may be credited in part to Frozen Food Month promotion in March. The dollar gain rate was more than double the 4.2 percent for all product departments combined.

HBA unit sales were 12.4 million higher than the year-ago reporting period. The tonnage increase of 4.6 percent was higher than any of the other product departments.

In the year ending Feb. 26, 1988, HBA volume tracked by SAMI was $8.1 billion, or 6.3 percent of the $129.1 billion volume in all 475 product categories combined.

Six product groups showed gains over the year-ago reporting period, and two—oral hygiene and shaving needs—showed declines. The best performance came from proprietary remedies (up 8.8 percent). Increases of more than five percent were recorded by deodorants (5.7 percent) and hair care needs (5.1 percent).

Of the 36 HBA product categories with unit volume increases, the highest gains occurred in categories with low volume—deodorants and talcum powders (up 49.8 percent) and feminine hygiene deodorants (up 44.3 percent). The only major decline among high-volume categories was a 10.6 percent loss for mouthwash.

Sales of baby needs rose 1.3 percent—a decline from the 12-week gain of 3.1 percent. Baby powders and infant clothes registered volume decreases (down 7.8 percent and 17.3 percent respectively). Baby oils, creams and lotions (7.9 percent) and nursing supplies (1.3 percent) both showed increases.

Six of the eight personal deodorant categories measured by SAMI/Burke showed unit volume increases in February. The product group as a whole gained 5.7 percent—losses in spray deodorants (down 7.2 percent) and creams (down 10.2 percent) held the group growth down slightly.

The 49.8 percent unit sales increase for deodorants and talcum powders can be attributed in large part to outstanding sales of Shower to Shower. The 44.3 percent increase for feminine hygiene deodorants may be credited to new Massengill items introduced within the past year.

Stick deodorants grew 7.6 percent—a lower rate than the 9.7 percent growth for the past 12 weeks or 10.3 percent for the past 52 weeks. Roll-ons increased 4.3 percent—an improvement over the 12-week period (up 2.4 percent) and the 52-week period (down 1.1 percent).

Volume for foot deodorants and athlete's foot remedies increased 7.4 percent. Volume for feminine douches and washes increased 15.8 percent.

Both first aid categories showed sales improvements, but with lower growth rates than in the previous four weeks. Antiseptics gained 0.7 percent and first aid products gained 2.9 percent.

Hair care up

In the hair care needs group, the best performance came from hair sprays (up 17.3 percent), paced by the new spritz items. In the hair setting needs category, which showed an increase of 9.4 percent, styling gels outperformed styling mousses.

While hair coloring products saw a 1.2 percent loss on an annual basis, the category increased 7.2 percent in the four weeks ended Feb. 26. Food store sales of hair conditioning rinses increased 3.7 percent—about the same as January.

Shampoos showed a loss of less than one-tenth of a percent in February. Home permanent kits and hair dressing needs, which have been slipping consistently, fell 12.9 percent and 4.4 percent respectively.

The oral hygiene product group showed a 0.5 percent loss, triggered by a 10.6 percent drop in the mouthwash category. Breath fresheners and denture cleaners lost 6.3 percent and 3.6 percent respectively.

Three oral hygiene categories showed improvements over their performances in January: toothbrushes (up 4.1 percent), dental aids (up 3.1 percent) and denture adhesives (up 0.5 percent). Sales in the groups highest volume category—toothpastes and powders—rose 2.5 percent, or 700,000 units during February. Toothpastes

SAMI UPDATE

HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO 4 WEEKS ENDING 1/1/88	4 WEEKS ENDING 1/29/88	4 WEEKS ENDING 2/26/88
BABY NEEDS	**+ 1.5%**	**+ 0.3%**	**+ 1.3%**
Baby Powders	−10.5	−10.3	− 7.8
Baby Oils, Creams & Lotions	+11.7	+20.5	+ 7.9
Infant Clothes	−18.8	−14.3	−17.3
Nursing Supplies	+ 0.7	+ 1.6	+ 1.3
DEODORANTS	**+ 5.3%**	**+ 8.4%**	**+ 5.7%**
Sprays	− 0.1	− 3.8	− 7.2
Roll-Ons	− 1.7	+ 4.1	+ 4.3
Stick Deodorants & Pads	+12.0	+ 9.9	+ 7.6
Creams	−10.9	−13.9	−10.2
Deodorants & Talcum Powders	+12.3	+10.0	+49.8
Feminine Hygiene Deodorants	+ 6.3	+28.2	+44.3
Foot Deodorants & Athlete's Foot Remedies	+11.6	+ 5.8	+ 7.4
Feminine Douches	+ 6.0	+ 9.1	+15.8
FIRST AID	**+ 6.2%**	**+ 3.4%**	**+ 2.4%**
Antiseptics	+ 5.6	+ 3.4	+ 0.7
First Aid Products	+ 6.3	+ 3.4	+ 2.9
HAIR CARE NEEDS	**+ 3.7%**	**+ 7.9%**	**+ 5.1%**
Shampoos	− 2.3	+ 0.9	0.0
Hair Sprays	+18.3	+28.2	+17.3
Hair Conditioning Rinses	+ 1.4	+ 3.6	+ 3.7
Hair Setting Needs	+ 7.8	+13.7	+ 9.4
Home Permanent Kits	− 5.5	− 8.9	−12.9
Hair Coloring	+ 2.2	+ 3.0	+ 7.2
Hair Dressing Needs	− 4.4	− 5.1	− 4.4
ORAL HYGIENE	**+ 6.6%**	**+ 1.4%**	**− 0.5%**
Toothpastes & Powders	+ 5.2	+ 0.1	+ 2.5
Mouthwashes	+20.8	+11.2	−10.6
Breath Fresheners	− 6.1	− 2.6	− 6.3
Denture Cleaners	0.0	− 7.8	− 3.6
Denture Adhesives	+ 2.3	− 0.5	+ 0.5
Toothbrushes	− 2.0	− 1.7	+ 4.1
Dental Aids	+ 6.6	− 2.6	+ 3.1
PROPRIETARY REMEDIES	**− 0.8%**	**− 0.6%**	**+ 8.8%**
Antacids	+ 1.2	+ 3.6	+ 5.6
Internal Analgesics	− 3.5	+ 0.8	+12.4
External Analgesics	− 0.7	− 2.0	− 4.7
Cold Remedies	+ 2.3	+ 0.5	+13.8
Nasal Sprays—Drops—Inhalers	− 3.4	− 5.0	− 1.5
Chest Rubs	−14.4	−11.5	+ 9.7
Cough Remedies	− 6.2	−10.8	+ 4.4
Laxatives	+ 3.9	+ 1.5	+12.8
Sleeping Aids	+16.4	+13.4	+15.5
Tranquilizers	− 0.2	+ 4.1	− 7.2
Synthetic Vitamins	+ 2.8	+13.5	+ 7.0
Eye Care Products	+18.5	+31.1	+15.1
Appetite Suppressants	+14.8	+ 4.4	+26.4
SHAVING NEEDS	**− 2.8%**	**+ 0.5%**	**− 1.1%**
Shaving Creams	+ 3.6	+ 8.9	+ 1.9
Pre-Shave Lotions	+ 3.2	+ 4.9	+ 0.5
After-Shave Lotions	− 0.8	+ 7.4	+ 3.9
Razor Blades	− 5.7	− 3.5	− 2.9
Razors & Blades	− 4.6	− 6.0	− 1.7
SUN CARE AIDS	**+ 2.9%**	**+14.8%**	**+ 4.7%**
Hand & Body Creams & Lotions	+10.1	+20.6	+ 5.5
Facial Preparations	− 5.4	+ 1.5	+ 4.1
Lip Care Products	− 3.5	+ 8.0	+ 9.4
Suntan Lotions & Oils	+13.2	+56.2	−28.2
Cosmetic & Medicated Skin Aids	+ 5.5	+ 4.1	+ 3.4
TOTAL ALL CATEGORIES	**+ 2.0%**	**+ 2.9%**	**+ 1.8%**

for kids and those geared toward plaque reduction have contributed greatly to the category's growth.

Proprietary remedies get hot

Of the 10 proprietary remedies categories that showed increases in February, the greatest increase came from appetite suppressants (up 26.4 percent). Sleeping aids (up 15.5 percent), eye care products (up 15.1 percent), cold remedies (up 13.8 percent), laxatives (up 12.8 percent) and internal analgesics (up 12.4 percent) all showed double digit growth.

Among internal analgesics, much of the category momentum was due to the sales vitality of aspirin and aspirin compounds resulting from favorable publicity on the use of these products for heart attack prevention. A banner season for colds and flu drove up sales of cold remedies, chest rubs (up 9.7 percent) and cough remedies (up 4.4 percent).

The only proprietary remedies experiencing losses were external analgesics (down 4.7 percent), nasal sprays-drops-inhalers (down 1.5 percent) and the traditional decline in the tiny-volume tranquilizer category (down 7.2 percent).

Sales of shaving needs as a product group receded 1.1 percent, primarily as a result of weakness in the high volume razor blades category (down 2.9 percent). There were small advances for shaving creams (up 1.9 percent) and pre-shave lotions (up 0.5 percent), and a more significant gain for after-shave lotions (up 3.9 percent).

The 4.8 percent four-week gain for skin care aids was less than the 6.7 percent gain on a 12-week basis or the annual increase of 9.3 percent. The best performance was achieved by lip care products (9.4 percent), the only category with a loss was suntan lotions and oils (down 28.2 percent)—always a low-volume category in February.

Hand and body creams and lotions increased 5.5 percent—sharply lower than the 20.6 percent increase in January. Facial preparations, which had shown sales weakness throughout 1987, gained 4.1 percent. Cosmetic and medicated skin aids increased 3.4 percent. ■